

Probate Flow Chart

Administration of a Decedent's Estate after Appointment

After the hearing granting the Petition:

- Obtain filed Order ([DE-140](#)) from court.
- Obtain Bond if applicable and file with court.
- Obtain certified copy of Letters ([DE-150](#)) from court.

Tasks to be done within 90 days of Letters Issuing:

- Send Notice to Franchise Tax Board (within 90 days of Letters) ([Probate Code 9202c](#)).
- Send Notice to Dept. of Health Services as to decedent and predeceased spouse if applicable ([Probate Code 9202a](#)).
- Send Notice to other Public Agencies if applicable ([Probate Code 9201](#)).
- Send Notice to Victims Compensation Board if applicable ([Probate Code 9202b](#)).
- Consult a licensed tax professional concerning your duties to obtain a Tax Identification Number from the IRS and file all necessary State and Federal tax returns.

Within 4 Months of Letters Issuing:

- Take control of all assets of the Decedent.
- File a Final Inventory & Appraisal ([DE-160](#) & [161](#)).
- Send Notice to Creditors ([DE-157](#)) along with a Creditors Claim ([DE-172](#)).
- If applicable, file a Creditor Claim ([DE-172](#)) for debts of the decedent owed to you and/or for reimbursement of expenses you paid from your personal funds for the decedent's funeral.
- Within 30 days of each claim being filed, an Allowance or Rejection ([DE-174](#)) must be filed.
- A written demand for payment from a creditor may be treated as a claim under [Probate Code 9154](#) if paid within 4 months and 30 days of when letters issue.

Within 1 year of Letters Issuing:

File one of the following:

- A Petition for Final Distribution (Local Forms [RI-PR006](#) and [7](#)), or A Status Report (Local Forms [RI-PR009](#) and [10](#)).

After Petition for Final Distribution is granted:

- Distribute Assets pursuant to the Order
- File Receipts
- File Ex-Parte Petition for Discharge ([DE-295](#))